

Summerfield Homeowners Association



ANNUAL UPDATE
2021

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Board Members



- Tom Halfaker - President
- Kim Caterina - VP & Architectural Committee Chair
- Brad Phillips – Secretary & Communications
- Michael Spring– Treasurer
- Bob McCleary – Special Projects

State of the Association



- **Review of 2020 – 2021**

- The past year for the SHOA has seen operational changes due to Covid-19. Due to restrictions in place, all board meetings are being held via Zoom. The community pool was reopened and remains in compliance with state and county restrictions.

- **Financial Status**

- See Financial Report for full details. The financial position of the Association continues to be healthy. The board had planned to raise annual homeowner dues this year but decided against this given ongoing economic conditions. Dues will be increased next year.

State of the Association



- **Goals for 2021 - 2022 Fiscal Year**
 - The primary goal for the upcoming year will be upgrades to the community pool
 1. As allowed by state and local regulations, full use of the pool area will be reinstated
 2. Most likely in October of this year, the pool will be drained and resurfaced
 - We will also continue to recruit new volunteers to serve on the board.

Architectural Committee Team Members



- Kim Caterina (Chair)
- Dana Giampietro
- Sarah Orr
- Amanda Boruff
- Shelby Thomas
- Aerial Anger**
- Diane Mendoza**
- Francean Williams**
- Kenny Malone**
- Michael Spring**

* new in the past year

** departed in the past year

Architectural Committee 2020-2021 Highlights



- Approved 58 Applications for Improvement (13 paint, 7 landscaping/hardscaping, 6 solar, 11 fence, 9 roof, 3 mailbox, 1 little library, 2 patio cover, 1 gutter, 2 front door, 3 garage door)
- Had 139 'perfect' homes throughout the year.
- Held 0 Violation Meetings
- Approval of applications can be done via email
- Reminder: Watch those weeds and garbage/recycle bins. Make sure to send in an architectural request form before any work is done to your yard/house.

Examples of Recent Improvement Projects



Beautiful paint job



Amazing landscaping



Great landscaping/hardscaping design



Little Library Installed

Completely remodeled house and yard



Amazing New Garage Door



Treasurer's Report



- 2020-2021 YTD Financial Summary
- 2021-2022 Budget & Dues

2020-2021 YTD Financial Summary

Summerfield Homeowner's Association 

Budget vs. Actuals: SHOA FY_2020_2021 - FY21 P&L

July 1, 2020 - May 19, 2021

- The statement below reflects the HOA's account summary as of May 19, 2021.
- The statement on the right reflects the financial statement for the 2020-2021 fiscal year.

Summerfield Homeowner's Association

Statement of Financial Position

As of May 19, 2021

	TOTAL
▼ ASSETS	
▼ Current Assets	
▼ Bank Accounts	
Funds Clearing	0.00
Pacific Western - Checking	66,461.91
Pacific Western - MM	3,474.51
Pacific Western - Reserve Acct	97,099.57
Total Bank Accounts	\$167,035.99
▶ Accounts Receivable	\$0.00
▶ Other Current Assets	\$0.00
Total Current Assets	\$167,035.99
▶ Fixed Assets	\$0.00
TOTAL ASSETS	\$167,035.99
▶ LIABILITIES AND EQUITY	\$167,035.99

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
▶ Revenue	\$54,640.29	\$57,185.29	\$ -2,545.00	95.55 %
GROSS PROFIT	\$54,640.29	\$57,185.29	\$ -2,545.00	95.55 %
▼ Expenditures				
Accounting	756.25	993.75	-237.50	76.10 %
Insurance	340.00	5,780.00	-5,440.00	5.88 %
▶ Landscaping	9,948.00	7,774.72	2,173.28	127.95 %
Legal Fees	950.00	950.00	0.00	100.00 %
▼ Pool		395.00	-395.00	
Pool Area Maintenance	841.88	348.88	493.00	241.31 %
Pool Cleaning & Maint.	4,774.59	3,575.00	1,199.59	133.55 %
Pool Permit		349.00	-349.00	
Total Pool	5,616.47	4,667.88	948.59	120.32 %
▶ Postage and Delivery	258.58	331.83	-73.25	77.93 %
Repairs & Maint.	6,300.00	461.55	5,838.45	1,364.97 %
▶ Supplies	310.00	34.02	275.98	911.23 %
Tax Preparation/Annual Rept	1,700.00	1,833.37	-133.37	92.73 %
Taxes, Licenses & Permits	359.00	35.00	324.00	1,025.71 %
Uncategorized Expense		310.00	-310.00	
▼ Utilities				
Gas and Electric	1,246.13	1,357.87	-111.74	91.77 %
Water	6,946.45	5,461.94	1,484.51	127.18 %
Total Utilities	8,192.58	6,819.81	1,372.77	120.13 %
Website	119.88	204.46	-84.58	58.63 %
Total Expenditures	\$34,850.76	\$30,196.39	\$4,654.37	115.41 %
NET OPERATING REVENUE	\$19,789.53	\$26,988.90	\$ -7,199.37	73.32 %
▶ Other Expenditures	\$550.00	\$1,318.86	\$ -768.86	41.70 %
NET OTHER REVENUE	\$ -550.00	\$ -1,318.86	\$768.86	41.70 %
NET REVENUE	\$19,239.53	\$25,670.04	\$ -6,430.51	74.95 %

2020-2021 Budget & Dues

Summerfield Homeowner's Association
Budget Overview: SHOA FY_2021_2022 (Copy) - FY22 P&L
 July 2021 - June 2022

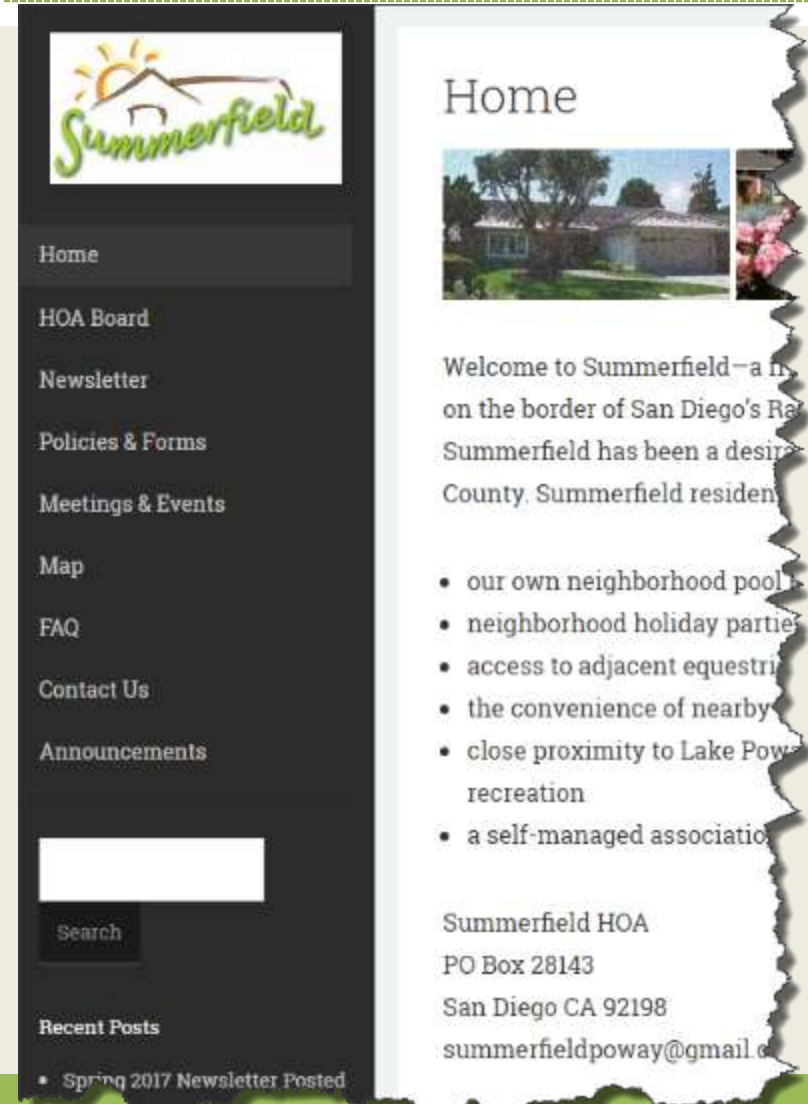
	TOTAL
▼ Revenue	
Escrow Transfer Fee	900.00
Homeowner's Dues	55,360.00
Interest Income	0.29
Late Fees	275.00
Penalties	172.50
Sales	-25.00
Tax Refunds	25.00
Total Revenue	\$56,707.79
GROSS PROFIT	\$56,707.79
▼ Expenditures	
Accounting	993.75
Insurance	5,780.00
▶ Landscaping	7,774.72
Legal Fees	950.00
▶ Pool	4,667.88
▶ Postage and Delivery	335.96
Repairs & Maint.	461.55
▶ Supplies	34.02
Tax Preparation/Annual Rept	2,000.00
Taxes, Licenses & Permits	35.00
Uncategorized Expense	310.00
▶ Utilities	6,819.81
Website	204.46
Total Expenditures	\$30,367.15
NET OPERATING REVENUE	\$26,340.64
▶ Other Expenditures	\$1,318.86
NET OTHER REVENUE	\$ -1,318.86
NET REVENUE	\$25,021.78

- The statement on the left reflects our 2021-2022 Budget.
- SHOA annual dues of \$320 per property
- Invoices mailed in June & payment due by July 31st

Communications Report



- Website
 - SummerfieldPoway.com
 - Goal: simple but useful
 - Policy documents
 - Meeting minutes
 - Docs needed for escrow
 - Announcements
 - Search looks inside all policies!



New to the Neighborhood – Start here!



- ‘How the neighborhood works’ intro page

Button on home page
and
Listed on menu

A green rectangular button with rounded corners, containing a white house icon and the text "New to the Neighborhood? Start Here!".

[New to the Neighborhood? Start Here!](#)



New to the Neighborhood? Start here!

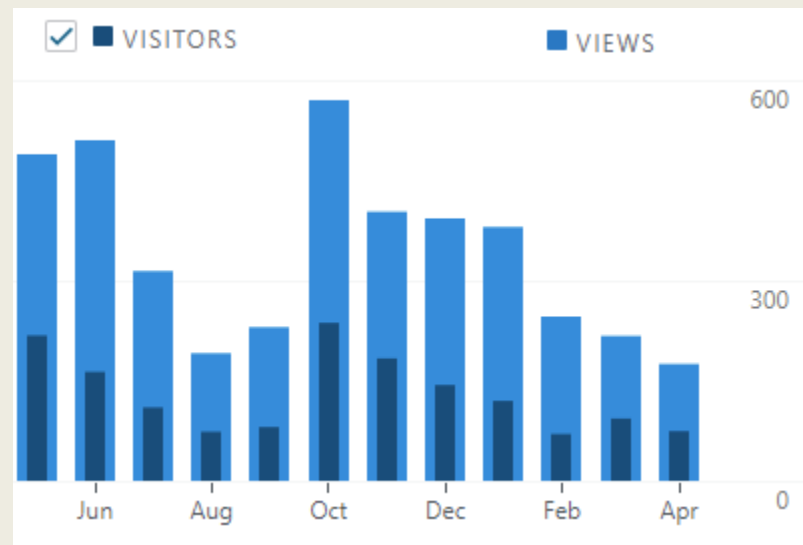
On behalf of the neighborhood, the Board of Directors of the Summerfield Homeowners Association (SHOA) welcomes you to our community. Our neighborhood HOA is governed and self-managed by a volunteer group of homeowners who are selected in annual elections to serve on the SHOA Board. We think you will enjoy the neighborhood and hope you will have a

Communications Report



- Website Views & Visitors

- Peak since April 2020 was October: Scoops posting



Communications Report



- Website View Stats for 365 days ending June 4, 2021

Policies & Forms	700
Summerfield Scoops - Oct 2020	305
HOA Board	282
New to the Neighborhood	176
Pool is OPEN!	145
FAQ	144
Contact Us	134
Map	122
Newsletter	122
2020 Pool Closing for the Season	59

Communications Report



- Getting the word out: *Any Way We Can*
- Emails
 - summerfieldpoway@gmail.com
 - hoa@summerfieldpoway.com
 - MailChimp
 - 50% to 60% get opened
- Making announcements on Facebook and NextDoor
 - summerfieldpoway.nextdoor.com
 - facebook.com/groups/summerfieldstates/

Communications Report



- NextDoor – get your neighbors to join!



Communications Report

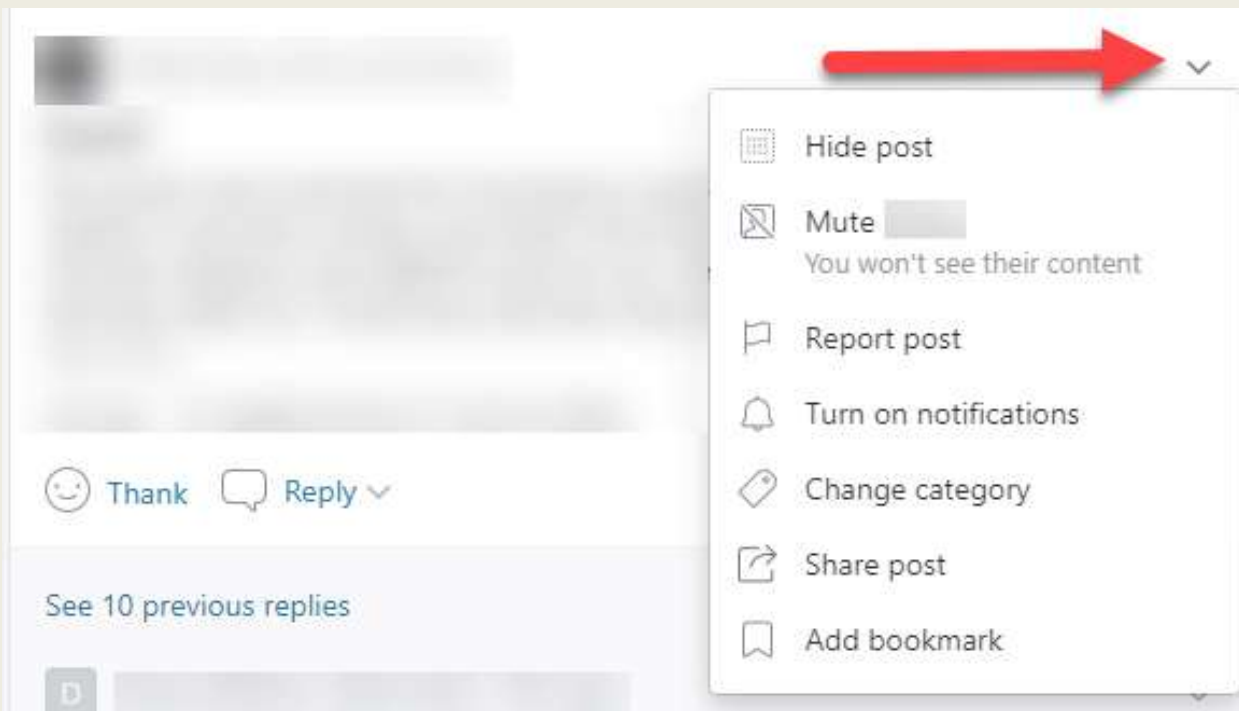


- NextDoor – Getting the most out of it
 - Choose your privacy settings
 - Choose whether and how often to get emails
 - Follow the NextDoor Community Guidelines, boiled down to "Everyone here is your neighbor. Treat each other with respect."
 - Use the right categories for posts
 - Every post (and response) should be about LOCAL issues.
 - Don't use Nextdoor as a soapbox

Communications Report



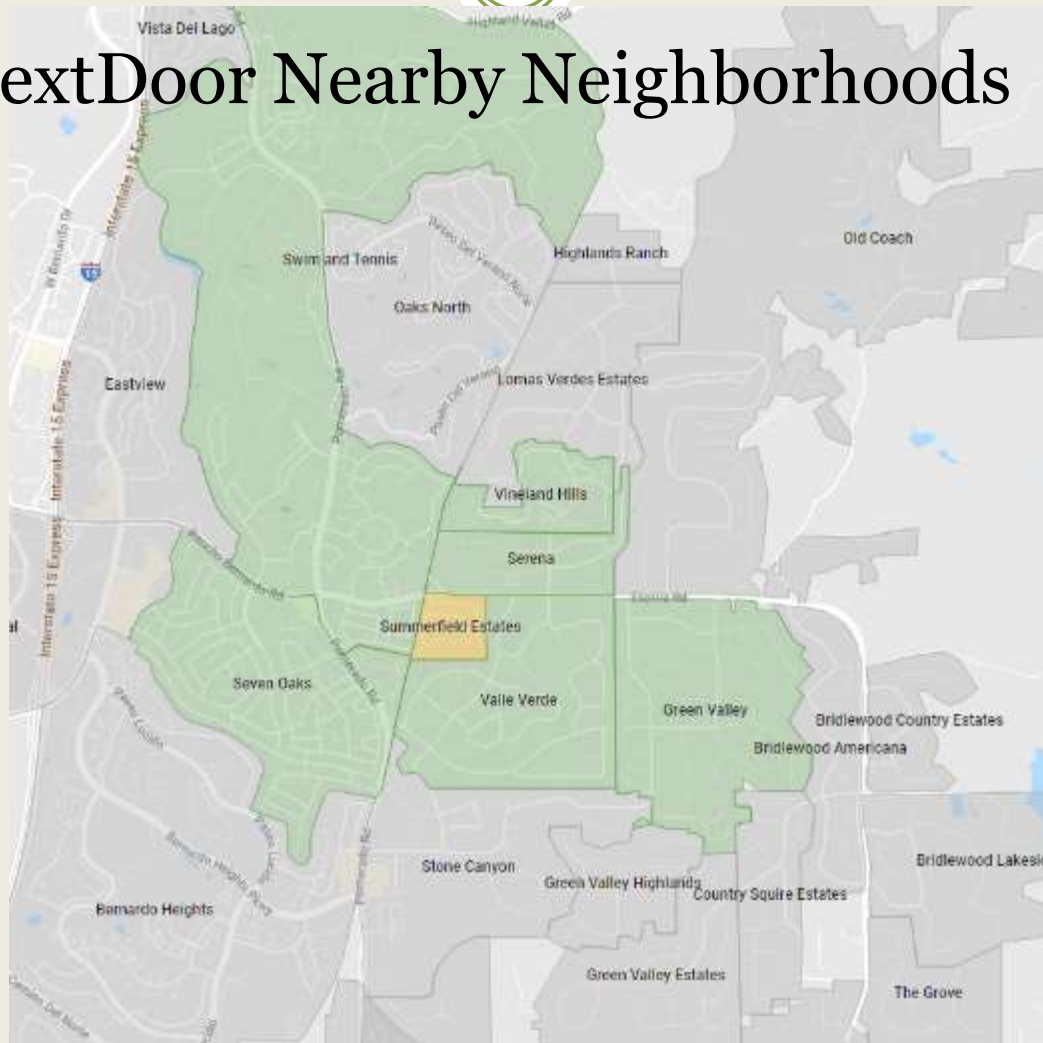
- NextDoor – Getting the most out of it
 - 'Hide posts' or 'Mute' problematic posters



Communications Report



- Choose NextDoor Nearby Neighborhoods



Communications Report



- Summerfield Scoops
 - Moved to more phone friendly
 - Anyone want to help write or suggest articles?



Communications Report



Keep us updated, so we can keep you updated!

New/alternate address? Renting? Rep/POA?

(It's the law: CA Civil Code 4041)

And: Email + Phone contact info



Special Projects - New Pool Service

- Mario retires after 18 years
- New pool service company selected
- John Lackerdas of Living Water Pools takes over

Pool Resurfacing

- Scheduled for mid-October 2021
- Existing plaster surface will be removed
- More durable quartz surface will be installed
- Two skimmers will be replaced
- New step trim will be added (per County Code)

Election Status



- **2021 Election**

- The annual election was not held this year because:
 1. There were no new volunteer candidates to run for the open seats that were to be filled in this election
- The open seats are currently held by current board vice-president Kim Caterina and special projects member Bob McCleary. We need volunteers for the Board!
- The normal board election cycle will hopefully resume next year.

Closing



- Please volunteer your time as a potential board member or as a member of the Architectural Committee

Thank you